State of North Carolina
Office of Information Technology Services

Michael F. Easley, Governor **George Bakolia, State Chief Information Officer**

May 16, 2005

Memorandum

To: Department CIOs

From: George Bakolia, State CIO

Subject: Portfolio Management Initiative – Project Training Schedule

The statewide portfolio management implementation project continues to be on track for implementation the end of June and first of July. The project team has finished its work developing a comprehensive training plan, and detailed training courses have been scheduled. This memorandum outlines the training approach, summarizes course contents, and details class schedules and registration processes.

Training Summary

The training plan focuses on four primary courses:

- **Overview Briefing** - for department CIOs, Chief Finance Officers, Budget Officers and key staff. This is a high-level summary of the project, including its rationale and approach and the highlighting of key business concepts underlying the principles and practices of portfolio management. Two classes will be given at the ITS building on May 23. The morning class is from 10:30 to noon, and the afternoon session is from 3:30 to 5:00.
- **Conceptual Portfolio Management Course** – for project managers and other IT and business staff members. This class covers the theories and disciplines underlying the methodologies and approaches for portfolio management. It explains the "why" behind the "what" and "how" of the software tool, including the concept and role of business cases. Each class is a half-day (3-hours) event, and they will be offered at the ITS building from 1:30 – 4:30 on June 6, 10, and 13.
- **Hands-On Tool Course -** for project managers and other staff members who will enter data into the tool and use it as an integral part of their work. This class addresses project planning, preparations for phase/gate approvals, and ongoing status reporting. Its objective is to provide a hands-on experience with the tool for performing detailed aspects of project management. Each class covers one-day (6-hours), and the 11 classes will be held at the Randall Building, which is located at 831 West Morgan Street (across from Central Prison). Class time is from 8:30 to 4:30, and classes will be offered June 13 – 16, 20 – 22, 27 and 28, and July 7 and 14. **Attendance at <u>either</u> one of the Overview Briefing classes <u>or</u> one of the Conceptual Portfolio Management classes is a prerequisite for attending the Hands-On Tool classes.**

- **Abbreviated Hands-On Tool Course –** for personnel who will use the tool to a lesser extent than project managers. This is a condensed version of the Hands-On Tool Course, with emphasis on the roles of reviewers and approvers for project artifacts. The overall capabilities of the tool will be explained, and the participants will get hands-on experience with the tool. Each class is half-day (3-hours), and the 4 classes will be held at the Randall Building, which is located at 831 West Morgan Street (across from Central Prison). The morning classes are from 9:00 to noon, and the afternoon sessions are from 1:30 to 4:30. Classes will be offered June 23 and July 13. **Attendance at <u>either</u> one of the Overview Briefing classes <u>or</u> one of the Conceptual Portfolio Management classes is a prerequisite for attending the Abbreviated Hands-On Tool classes.**

Class Registration Information

The table below provides detailed registration information for the four courses described above. Each department must submit **one consolidated** Training Registration Form (which will be sent to department CIOs by separate e-mail) that covers course numbers 2, 3, and 4 below. That form must be received by 5:00 pm Tuesday, May 31. Earlier submission is encouraged, and failure to respond promptly may result in department staff not being scheduled for the desired class dates or times.

Class Title	Participants	Registration Process
1. Overview Briefing	CIOs, CFOs, CBOs, and key financial, budgeting, and IT management staff.	Registration information should be addressed to Patricia Land at patricia.land@ncmail.net (981-5525). The department, session desired (morning or afternoon) and names of attendees should be given.
2. Conceptual Portfolio Management	Project managers, department project office staff, and other IT and business personnel.	Complete the consolidated Training Registration Form (Excel document) and e-mail to Denny McGuire at denny.mcguire@ncmail.net (981-5150 for questions).
3. Hands-On Tool Course	Project managers and other personnel who will be inputting data into the tool and using it more extensively in job responsibilities.	Complete the consolidated Training Registration Form (Excel document) and e-mail to Denny McGuire at denny.mcguire@ncmail.net (981-5150 for questions).
4. Abbreviated Hands-On Tool Course	CIOs, and CFOs, and IT support staff that will perform project and artifact review or approval functions.	Complete the consolidated Training Registration Form (Excel document) and e-mail to Denny McGuire at denny.mcguire@ncmail.net (981-5150 for questions).

Note: If your department serves in an oversight role or is a pilot department for customizing the portfolio optimization and staff resource planning components of the tool, information for the classes covering these features will be included in your Training Registration Form.

Department Allocations of Software Tool Seat Licenses

Although we have purchased a sizeable number of seat licenses for using the software, there is a finite number for distribution to the departments and oversight personnel. Your allocation for seat licenses is provided in the Training Registration Form. **Personnel assigned seat licenses must be able to use the tool properly; therefore, department staff assigned licenses must attend <u>either</u> one of the Hands-On Tool classes <u>or</u> one of the Abbreviated Hands-On Tool classes.**

CC: Department Chief Financial Officers